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## Poland

## Cotton and Products

## Update

## 2004

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**Report Highlights:**

In spite of ongoing privatization in the textile industry, 2003 was not a very good year for the cotton industry. The cotton industry suffered from the effects of an economic downturn in Poland as well as from the continued inflow of cheaper yarn and textiles from Asia.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
Warsaw [PL1]  
[PL]

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## Production/Consumption

## Cotton – PSD

PSD Table						
Country	Poland					
Commodity	Cotton				(HECTARES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		08/2002		08/2003		08/2004
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Beginning Stocks	4572	2369	5225	4007	4790	2950
Production	0	0	0	0	0	0
Imports	49859	57205	52254	53681	0	54000
MY Imp. from U.S.	0	167	0	51	0	0
TOTAL SUPPLY	54431	59574	57479	57688	4790	56950
Exports	218	181	435	310	0	100
USE Dom. Consumption	48988	55386	52254	54428	0	54000
Loss Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	48988	55386	52254	54428	0	54000
Ending Stocks	5225	4007	4790	2950	0	2850
TOTAL DISTRIBUTION	54431	59574	57479	57688	0	56950

Imports of cotton in 2003 were down 6 percent compared to the 2002 level which was lower than the 2001 level. In addition, cotton consumption was down 1.7 percent. The decrease in consumption is attributable to the closure of two major plants that annually processed about 4 percent of imported cotton. On the other hand, most of the major spinning mills' production was 5-7 percent higher than in 2002. The weak economic situation in Poland and the weak financial condition of the cotton industry, as well as imports of cheap yarn and textiles from abroad have had a major impact on the Polish cotton market. In 2003 nearly 78 percent of the Polish textile industry was private sector controlled. This is a significant increase compared to the 13 percent level of privatization in 1998.

Production	CY 00	CY 01	CY 02	CY 03
Yarn, Cotton & cotton blend,				
- total, 1000 MT	49	46	46	37
- of total yarn: carded, 1000 MT	4.2	3.7	4.6	4
Threads, cotton & cotton blend,				
- total, 1000 MT	n.a.	n.a.		

## Trade

## Exports of Cotton

<b>Export Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Cotton		
Time Period	Jan-Dec	Units:	MT
Exports for:	2002		2003
U.S.		U.S.	
Others		Others	
Slovakia	94	Germany	73
Hungary	34	Italy	19
Germany	7	Latvia	11
		France	2
Total for Others	135		105
Others not Listed	11		
Grand Total	146		105

## Imports of Cotton

<b>Import Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Cotton		
Time Period	Jan-Dec	Units:	MT
Imports for:	2002		2003
U.S.	167	U.S.	51
Others		Others	
Uzbekistan	28925	Uzbekistan	21591
Tajikistan	6865	Tajikistan	8621
Kazakhstan	5284	Kazakhstan	7667
Chad	2634	Chad	2348
Azerbaijan	1322	Greece	1701
Kyrgyzstan	1155	Turkey	1439
Greece	1105	Kyrgyzstan	1236
		Azerbaijan	1132
Total for Others	47290		45735
Others not Listed	4583		2945
Grand Total	52040		48731

In 2003 Uzbekistan was again the number 1 exporter of cotton to Poland with 57.2 percent (although it has continued to decline since 1998) of the market. Tajikistan's cotton exports represented 16.5 percent of the market. In addition, there were higher imports of cotton from African countries and Greece. There were also smaller imports of cotton from South America, Syria, and Turkey. In spite of competitive prices in 2003, American cotton did not return to the Polish market.

According to statistics from Poland's Main Statistical Service, Poland exported cotton to Germany, Italy, Latvia, and France. The average price for imported cotton in 2003 was \$1,384.45/MT compared to \$1,071/MT in 2002. The average price for U.S. cotton was also higher and reached \$1,381/MT.